

Front Office Enterprise

Implementation Guide

This implementation guide provides guidance on the steps that should be considered when implementing Front Office Enterprise.

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1.0 Introduction

This implementation guide provides guidance on the steps that should be considered when implementing Front Office Enterprise. It steps through initial configuration, defining the service catalog, the implementation of your service catalog within Front Office Enterprise and finally offers some suggestions around how training could potentially be approached. Tips are offered throughout the document to assist you in taking full advantage of the solution.

A quick reference checklist is also provided.

1.1 Project Milestones

Although the process, as you will see from below, of implementing Front Office Enterprise is a very straightforward one we still recommend that the implementation is treated as any other enterprise software implementation would be and this means following a project plan. Listed below are the key milestones for the implementation:

- Project Kick Off
- Front Office Enterprise Installed
- Service Catalog Defined
- Master Data Uploaded
- Service Catalog Configured
- System Testing Completed and Signed Off
- Training Delivered
- User Acceptance Testing Completed and Signed Off
- Communication and Internal Marketing Completed
- Sign Off and Moved to Production
- Go Live

2.0 Implementing Front Office Enterprise

The first stage of implementing Front Office Enterprise is installing the solution. Front Office Enterprise can be downloaded from the Biomni Download site (details can be obtained from your allocated Biomni Consultant) and it is recommended that you read the Front Office Install and Upgrade guide as you move through the installation process. This document is downloaded as part of the installation pack.

Once installed the following post installation configuration steps should be followed (the below link to other sections in this document):

- Configuration Check and Core Email Addresses
- Theme

Tip: When installing Front Office Enterprise, select to install the sample content, this then can be used to assist with defining your service catalog.

2.1 Defining your Service Catalog

Key to a successful implementation of Front Office Enterprise is clearly defining your service catalog, its services and service request processes. The following steps will help ensure you capture all of the information required to successfully implement your service catalog.

Tip: Once Front Office Enterprise has been installed take some time reviewing the pre-shipped service catalog, services and processes to give you some ideas on how your service catalog may look.

2.1.1 Definition of the service category structure

Consider what categories and sub-categories your service catalog requires for the services to be published into, identifying any supporting text that should be supplied as part of that service category. Also define, if appropriate, what users or groups of users should have visibility and access to a particular category.

Tip: Try to keep category names generic whilst meaningful to the end user community they are aimed at. Additionally keep any supporting text brief and to the point.

Tip: Although Front Office Enterprise supports a multiple level service category hierarchy, consider how many clicks your users will need to make to find what they are looking for. Try not to take the service catalog beyond three levels.

2.1.2 Definition of suppliers and/or catalogs

Identify if your service catalog needs to contain more traditional product catalogs and where these are going to be sourced from, for example, direct from external suppliers or are you going to implement and manage these internally. Once the catalog requirements have been identified you need to consider how to present these to the end user community, do you want to link through directly to the catalog or

build more logical groupings (bundles) of items such as a 'New Starter Bundle' which contains all of the items and services required to on-board a new employee.

Tip: Catalogs can be imported into Front Office Enterprise via a CSV file. The template can be downloaded from Front Office via Admin -> Catalog -> Export and is an ideal tool to capture your catalog content.

2.1.3 Definition of services

When defining the services that are to be published within your service catalog consider the following points/areas (anything with a * is mandatory and required within Front Office Enterprise):

- Service Name*
- Service Type* – Customer, Business or Technical
- The owner of the service / group responsible for the service
- Service Description
- Price Description
- Service Level Description
- Dependencies – what other services is the service linked to (as a parent or as a child)
- Access – which groups of users will have access to the service
- Service Category – what category does the service fall under
- Can the service be requested (actionable) or not
- Should it be displayed on the homepage

Tip: Try to write service, pricing and service level descriptions in a plain to understand manner.

Note: A spreadsheet is provided to assist in the capture of the Service Definition and related information. Details can be found by following the link [Service Definition Capture](#)

2.1.4 Definition of the service request form

The next step in defining your service catalog, is defining the request forms that are to be presented to the end users to capture the information required to fulfill a service request. Things to consider when defining your request forms are:

- What fields are required and what type of field is each field going to be i.e. Text, List box?
- Does a field require help text?
- How is the request form going to be presented, is it going to have one or two columns, one or multiple sections?
- What roles are going to touch the request form and for each role how should the field be presented i.e. Mandatory, Read-Only, Hidden or Optional?

Tip: Ensure each of your service request forms is capturing the information required to fulfill that service request; however at the same time do not ask the user for more information than is required otherwise it will leave them frustrated!

Tip: Front Office Enterprise ships with a number of pre-configured service request forms; use these as a guide when building new forms.

Tip: Read the Form Design Best Practice Guide (Admin -> Documents) for useful tips on the best way to present your request forms.

2.1.5 Definition of the service request approval process

Where a service requires approval when requested, clearly define the roles and rules for each of the approval steps including who needs to approve at each step.

Note: Front Office Enterprise caters for three types of approval: Approver, can approve or decline a request; Stager, needs to add additional information to the service request, and; Notification, the user receives an email to inform the request has been raised.

Tip: Try to keep approval limited to as few steps as possible.

2.1.6 Definition of the service request fulfillment processes

For each of the identified actionable services define the fulfillment from the point that they are fully approved through to service delivery and completion. Consider who needs to touch the request, including automated system activities and what needs to be undertaken and captured at each stage.

2.2 Configuring Front Office Enterprise

2.2.1 System Configuration

Following the definition of the service catalog you should be in a position to complete the configuration of the main system areas of Front Office Enterprise, including uploading organizational data. The following configuration steps should be followed to complete the core configuration (the below link to other sections in this document):

- System Configuration
- Currency and Language
- Organizational Data
- Suppliers, Catalogs and Bundles

Tip: where possible try to automate the updating of organizational data and schedule this process to occur outside standard office hours, where the solution is in use 24x7 schedule for a time where there are low loads on the system.

2.2.2 Implementing your service catalog

Taking the information collated during the 'Defining your service catalog' stages it is now time to build out the service catalog and its related product catalogs, services, service request forms, approvals and fulfillment processes within Front Office Enterprise .

The following documents are available within the product to support you in this process:

- Getting Started (Admin -> Getting Started)

- Service Catalog Overview (Admin -> Documents)
- Form Design Best Practice (Admin -> Documents)
- Complete Administration Guide (Admin -> Documents)

Tip: During the implementation process involve key users such as Service Managers and Fulfillment Team members to get feedback on the processes that you are implementing. Front Office Enterprise has been built to allow changes to be made quickly and on the fly.

2.3 Training

Front Office for Enterprise has been designed to be intuitive to end-users, anyone that has experience of using websites such as Amazon or iTunes should be able to come into the solution and browse services and subsequently raise a service request. In a similar fashion the solution has been designed so users who do not have programming experience can administer, maintain and support Front Office Enterprise. The solution provides a number of documents and by reading these it is possible to start configuring the solution straightaway.

When running an implementation themselves, Biomni Consultants will typically incorporate training into the implementation process, for example, stepping the admin users and/or service owners through implementing their own processes. We find via this approach that those users become more self-sufficient in the solution and can adopt the on-going maintenance from a very early stage.

Our consultants also do provide 1 hour training sessions which can be tailored to specific customer's requirements and can be at the customer's pace. Typically these sessions are to cover:

- Getting Started
- Configuring the Service Catalog
- Configuring Front Office internal Workflow

There are always customers who prefer a more traditional approach to training and for these customers we have developed a number of training courses (click on the appropriate course for more detail):

- Front Office Solution Management Overview
- Service Catalog Administrator
- Key User – Service Request
- Key User – Service

3.0 Implementation Checklist

| Installing Front Office Enterprise | |
|---|--|
| Configuration check | |
| Set core email addresses | |
| <i>Theme (optional)</i> | |
| Defining Your Service Catalog | |
| Definition of the service category structure | |
| Definition of suppliers and/or catalogs | |
| Definition of services | |
| Definition of the service request forms | |
| Definition of the service request approval process | |
| Definition of the service request fulfillment process | |
| Configuring Front Office Enterprise | |
| System configuration | |
| Currency and language | |
| Organizational data | |
| Suppliers and catalogs | |
| Implementing your service catalog | |
| Training | |
| Asses Training Needs and Plan Training | |

Appendices

4.0 Post Installation System Configuration

Following the successful installation of Front Office Enterprise the following steps should be followed to ensure that the solution is configured correctly for the needs of your organization. Some of these steps may not be relevant as the default settings may be sufficient for your implementation.

4.1 Configuration Check and Core Email Addresses

Navigate to Admin -> Configuration Check (can be found in the Support Section)

4.1.1 Server Tab

Windows Services – this section shows the status of windows services which are pointing at the Front Office database. Each windows service writes 'heartbeat' information into the database on a five minute schedule. If the database has not received a heartbeat within seven minutes this will be detected and the service highlighted in red. For a standard installation there will be three jobs listed: Scheduler; Task Engine, and; Internal Workflow.

Web Root Address – this should be the URL of the home page of Front Office, as seen by a user of the system. This setting is used when constructing emails which hyperlink into Front Office. If the value is incorrect it can be changed in System Configuration (Admin -> System Configuration -> Web Root Address).

Public Web Service URL – this should contain the URL of the Front Office Public Web Service. If the value is incorrect an error message will be displayed. The value, if incorrect, can be changed in System Configuration (Admin -> System Configuration -> Public Web Service URL).

4.1.2 Base Settings Tab

This displays the default settings for: System Language; System Currency; System Time Zone, and; Country Code, as selected during the installation process. Changes can be made in System Configuration (Admin -> System Configuration -> Default System Language or Default System Time Zone or Default System Country Code).

Note: System Currency cannot be changed post installation.

4.1.3 Email Tab

Configure SMTP Settings – Front Office Enterprise needs to point to an SMTP server to enable the sending of emails generated by the solution. To point Front Office Enterprise to an SMTP server click on 'SMTP Settings' and populate the requested information.

Core Email Addresses – there are three core email addresses that need to be set. These are: Administrator, this is set by amending the 'Admin' user via Organization -> User; Support Team, so the email address of the team that any system alerts or support emails need to be routed to, this is set in System Configuration (Admin -> System Configuration -> Email Address of Support Team), and; From

Email Address, so the email address that emails originating from Front Office Enterprise appear to be sent from, this is set in System Configuration (Admin -> System Configuration -> "From" Mail Address).

Email Formatting – each of the emails that are sent from Front Office Enterprise have a template which is accessible via the 'Email Formatting' button. By clicking through to a template it is possible to edit the contents of the email and format it to your organizations requirements. This is achieved in one of two ways dependent on the email being edited, via a rich text/HTML editor or via an XSLT where the current XSLT can be downloaded as a guide.

Email Queue – queued emails can be viewed via the 'Email Queue' button. The queue will show any error encountered sending the email. Emails are removed from the queue on being sent successfully.

Note: If your server is not fully up to date with Windows updates, errors may be generated on attempting to send emails. Please see Appendix 7.9 of the Front Office Install and Upgrade Guide for further information.

4.2 Theme

Front Office installs with a number of different 'Themes' (look and feel) which can be selected via the 'Theme for Styling Web Site' system setting within System Configuration (Admin -> System Configuration). These themes are built on CSS style sheets and can be edited (CSS skills knowledge and skills required) to meet the look and feel of your organization's corporate standards.

To create a new theme navigate to the Front Office 7.1 folder on the web server default (\Program Files (x86)\Biomni) and drill down to Website\App_Themes copying the contents of one of theme folders into a new folder (under App_Themes), using the Theme.css and Z-Override.css to configure the theme. This new theme will then appear under the 'Theme for Styling Web Site' system setting.

Tip: To add your organization's logo to the theme, copy a gif file into the 'Images\Header' folder of the theme, labeling the file logobar.gif.

4.3 System Configuration

System Configuration is the area of the system where individual functionality of the solution can be turned on or off, as well as defining some key system information such as core email addresses. A guide to the settings that can be configured via this screen can be found under Admin -> Documents (in the Support area) -> System Settings. To access System Configuration navigate to Admin -> System Configuration (in the System area). Key settings will have already been set based on a typical implementation, whilst others will have been left for you to configure to optimize the solution for your organization's needs.

Tip: The following settings are those that are mostly commonly configured post implementation:

- *Default Approval Escalation Group*
- *Exclude Requestor from the Approval List*
- *Display Request Price on Request Summary*
- *Edit the Service Catalog Page Title*

- *Enable the Quick Links Panel in the Service Catalog*
- *Enable Users to Select Preferred Language*
- *Show Connecta Information in Request Summary Header (usually reset to 'No')*
- *Theme for Styling Web Site (please see below for further information)*
- *Enable 'Forgotten Password' Functionality (if not using single sign on)*
- *Force Alphanumeric Passwords (if not using windows authentication)*
- *Minimum Length of New Password (if not using windows authentication)*
- *Number of Previous Passwords Retained (if not using windows authentication)*
- *Password Retries Allowed (if not using windows authentication)*
- *Period of Time Before Password Expires (if not using windows authentication)*
- *When Should Passwords Expire (if not using windows authentication)*
- *Include All Data When Copying a Request*
- *View Requested For User's Catalog*
- *Auto Generated Order Number – Number Length*
- *Auto Generated Order Number – Text Prefix*
- *Enable Windows Authentication*
- *Set Domain Name Rules for User Login (if using windows authentication)*
- *System Session Timeout*
- *Enable User Selection of Time Zones.*

4.4 Currency and Language

Front Office Enterprise supports multiple currencies and languages within the one implementation. By default only the Euro and the currency selected at installation are activated along with the language selected during the installation process.

4.4.1 Currency

To activate further currencies navigate to Admin -> Currency & Language -> selecting Currency from the drop down menu. Those currencies that are currently active will be displayed. To activate an inactive currency, change the 'Active' filter to 'Inactive' and utilize the search box to find the required currency. Click on the 'Activate' link to activate the currency. To edit the exchange rate of an active currency, click on the currency and then on the add button.

***Note:** Currency exchange rates are not automatically updated therefore a manual process should be put in place to maintain these.*

4.4.2 Language

To enable further languages navigate to Admin -> Currency & Language -> selecting Language from the drop down menu. Click the enable link for each of the languages to be enabled.

***Note:** All system content, such as: menus; page titles, and; administration areas are shipped in all the supported languages of the release. All configured content, such as: service categories; service descriptions, and; request fields etc. need to be entered in all the languages they are to be displayed in.*

4.5 Access Profiles

Access Profiles are assigned to each user to determine what they can see and do within the system. To create a new access profile or profiles navigate to Admin -> Access Profile, clicking 'New' to create a new profile. A list of available access rights will be presented to you and as you select a right it will move automatically into the 'Linked Access Rights' area of the screen.

5.0 Organizational Data

Front Office Enterprise uses organizational data such as: users; cost centers, and; divisions/business units; within the service catalog and related service request processes to: restrict access to services; drive authorization routing, and; pre-populate request form fields.

Users are stored locally within Front Office Enterprise with each user having their own user record.

5.1 Types of Organization Data

5.1.1 Divisions

Divisions are used within the solution to provide separation on the requests that can be seen by users. Each Cost Center is placed in a Division. A Division is typically a representation of a Business Unit, High Level Department, or Sector etc.

5.1.2 Cost Centers

As well as representing traditional cost centers, the cost center functionality can be used to capture departments. Cost Centers are typically used to drive authorization and for reporting purposes such as a break-down of services raised by a cost center for a monthly period.

5.1.3 Users

Users are stored locally within Front Office Enterprise with each user having their own user record. A user is defined as someone who can raise a request, have a request raised on their behalf, approve a request or undertake Front Office Enterprise fulfillment activity or a combination of these.

5.1.4 User Groups

User groups can be utilized in certain areas of the system such as; service catalog view filtering; authorization; service owners, and; fulfillment activity.

5.1.5 User Field Defaults

It is possible to set a default value for a request field against a user, so when a user creates a request the value of the field is automatically populated.

Note: this cannot to be used until the related request fields have been created.

5.1.6 Position Codes

Front Office Enterprise caters for a hierarchical structure of the organization to be imported; with this then being available to drive authorization routings.

5.1.7 Addresses

Addresses are used within the system as both invoice and delivery addresses against requests raised. Each user can have a default address against their user profile. Addresses can be set as default against users, cost centers, divisions and organization.

Note: Addresses are optional and do not have to be used within the solution, they are typically utilized where procurement is required.

5.2 Types of Organizational Data Provision

The solution offers a number of ways of providing organizational data, ranging from data entry screens through to scheduled import routines.

5.2.1 Entry via the user interface

It is possible to enter organizational data via the user interface; this can be done typically one of two ways:

Data Entry Screens

For each type of organizational data stored within the solution a data entry screen is provided where an administrator is able to enter and/or maintain the data. These screens are accessed via Admin -> and then clicking on one of the options in the Organization area. Each screen will guide the user through what information they need to enter.

Manual Import

Front Office Enterprise also provides the ability for the administrator to upload organizational data via CSV files, thus allowing for bulk uploads of information via the UI. These screens are accessed via Admin -> hovering over the required data area within the Organizational area and selecting 'Import' from the drop down list. So for example, if you wanted to import cost centers, you would navigate to Admin -> Cost Center -> Import. The import screens allow the administrators to export the current data held within Front Office Enterprise, as well as downloading a template for the information to be imported. On importing a CSV file the administrator selects the location of the file and clicks OK to import, they then can watch the progress of the import routine as the file is processed.

5.2.2 Automated Import Routines

Organizational data can be imported into Front Office Enterprise via automated import routines. This occurs by a CSV file for each type of data to be imported being placed in a defined directory and then Front Office Enterprise on a scheduled basis picking up the file(s) and importing the data. The templates for the CSV files can be found for each type of organizational data via Admin -> hovering over the required data area within the Organizational area, selecting 'Import' from the drop down list and clicking 'view import file template'.

The scheduling of the import routine is configured at Admin -> More (within settings) -> Scheduled Task and selecting 'Import Master Data'.

Tip: Where possible schedule import routines to occur outside normal working hours or to occur (if 24x7) when loads on the system are low.

5.2.3 Active Directory Integration

User records can be imported from Active Directory on a scheduled basis, with the ability to assign users or groups of users to user groups, cost centers and/or access profiles. Any number of tasks can be configured providing flexibility around assigning users to user groups etc. To configure Active Directory Integration, navigate to Admin -> User -> Import Active Directory (from the drop down). To create a new import routine click on 'New' and provide the information requested to connect to the required Active Directory.

6.0 Suppliers, Catalogs and Bundles

The Front Office Enterprise solution caters for more traditional product catalogs, similar to what you would see in an e-procurement system. This allows your service catalog to clearly display physical items and the associated cost as part of a service offering. The catalogs can be maintained locally by you or be supplied by external suppliers.

6.1 Suppliers

Each catalog that is to be presented within the Front Office Enterprise solution needs to be associated to a supplier record. Supplier records are created and maintained via the Supplier screen (Admin -> Supplier). Each supplier must have a unique code and name; additionally you must set how many category levels the supplier's related catalog will have.

Tip: A supplier can only be associated to one currency, so if the catalog needs to be uploaded in multiple currencies (i.e. a different price per currency) then a supplier record per currency will be required.

6.2 Catalogs

Catalogs can be built down to five levels of categorization and contain up to three lines of description. Front Office Enterprise offers an upload mechanism to upload catalogs via a CSV file. The file format can be downloaded via Admin -> Catalog -> Export, selecting the required supplier; where the supplier already has items within the system these will be downloaded as part of the export routine. To import a catalog navigate to Admin -> Catalog -> Import selecting the supplier and the file location, once the file has been uploaded you can watch the progress of the catalog import.

Tip: Catalog imports are full catalog imports not partial, so on import ensure your catalog contains all of the items required, as the existing catalog content will be overwritten.

6.3 Bundles

Bundles are logical groupings of items from one or more suppliers and are an ideal way to restrict the viewing of the full supplier catalog by end users. Bundles can be configured through the user interface

Admin -> Bundles or can be uploaded via a CSV file Admin > Bundles -> Import. The import template can be downloaded from exporting an existing bundle Admin -> Bundle -> Select a bundle -> Export.

7.0 Training

7.1 Front Office Solution Management Overview

This course is aimed at delegates who do not require intimate product knowledge, but who need an understanding of the Front Office Enterprise solution and how it is used. By the end of the course delegates will be able to describe the products used when placing a request and understand the methods adopted

- Audience - Individuals who require knowledge of the end to end Front Office Enterprise process
- Pre Requisites - None
- Duration - 1 Day

7.2 Service Catalog Administrator

This course is aimed at Service Catalog System Administrators who have the responsibility for the day to day running of their own installation. By the end of the course delegates will be able to understand and control the service catalog and fulfillment process. They will also be able to administer their system with respect to user and system settings.

- Audience - Individuals who have responsibility for the Administration of their own system
- Pre Requisites - Delegates should have had exposure to the Front Office Enterprise system and have Administrator access privileges. Access to Front Office Training system/database.
- Duration – 1 Day

7.3 Key User – Service Request

This course is aimed at key users of the Service Catalog front end, who have the responsibility for passing on basic Service Request training to other staff within an organization. By the end of the course delegates will understand the methods used when raising a service request and will be able to pass that knowledge on. They will also be able describe the methods used when Approving a request.

- Audience - Individuals who are identified as Key Users within an organization and need to be able to aid other users in raising a service request.
- Pre Requisites - Delegates should have had exposure to the Front Office Enterprise system. Tutor access required to Front Office Training system/database.
- Duration -1/2 Day

7.4 Key User – Service Fulfillment

This course is aimed at key users of the Service Fulfillment front end, who have the responsibility for passing on basic Service Fulfillment training to other staff within an organization. By the end of the

course delegates will understand the methods used when managing the fulfillment of a service request and will be able to pass that knowledge on.

- Audience - Individuals who are identified as Key Users.
- Pre Requisites - Delegates should have had exposure to the Front Office Enterprise system. Tutor access to Connecta Training system/database.
- Duration -1/2 Day

8.0 Service Definition Capture

8.1 Overview

The following appendix is to be used in conjunction with the spreadsheet 'Front Office v7.1 Service Definition.xls' (which is provided alongside this document within the Biomni Community). This spreadsheet provides a mechanism to capture information pertinent to the Services and Service Requests that are to be configured and ultimately raised by end-users within the Front Office solution. The information captured spans the whole life cycle of the Service and related Service Request, from request creation, through authorization and approval, to request fulfillment and SLA monitoring. Each Service should be documented within its own copy of the spreadsheet.

8.2 Service Definition

8.2.1 Service

Each Service has several pieces of data that display to users via the user interface when requesting through the Service Catalog, including a name and description. If only the Service Name is completed, and the service is requestable, only the requestable end point is displayed to the user.

The Service Type (Technical, Business, Customer, System or Configuration Item), Criticality (Business Critical, Mission Critical, Operational or Administrative), Group (allowing demarcation of services) and Owner (selectable user or group) are all summary level service information visible to the user.

Additional attributes can be associated to a Service via the Attributes section and any Keywords for searching can be entered into Search Keywords section. Only spaces should separate multiple keywords.

8.2.2 Price & SLA

Detailed information around Pricing and Service Level Agreements can be displayed to the end user when they view the description of a particular Service.

8.2.3 Dependencies, Access, Category

Dependencies

Other Services contained within Front Office can be associated to the Service as parent or child relationship. These relationships are then presented to the user with the ability to click through to the dependent Service.

Access

By default all users will be able to see the Service within the Service Catalog; however access can be restricted via User Groups.

Category

Services must be linked to one or more Service Categories with the Service Catalog structure. Additionally a Service may also be displayed on the Front Office homepage as a quick link (when linked to a top level category).

8.2.4 Request Type

Request Types are designed to enable capture of the information necessary to fulfill a user's request for services. Request Types can also contain line items either from a pre-determined bundle/group of items or individual items selected by the user from the available catalogs. Any request type containing items is comprised of up to three levels, which can have fields appearing at each level as required: Header, Supplier and Item (the supplier page is only displayed if supplier specific field information is configured). Business forms have only one generic (header) level where fields are displayed.

Access to specific request types can be controlled by utilizing user groups.

As the user navigates through the request form it is possible for Front Office to make real time integration calls to other systems to retrieve additional information and include on the service request being raised.

8.2.5 Request Information

Information that is collected from the end or other users during the requesting process can be shared across a number of requests or be unique to an individual request. This information may be one of several formats, i.e. Text Field, List Box. The need to ask the user for a piece of information can be made dependent on an answer given to a list box question, for example you may only want to ask for asset information if a user has answered the question 'Does the equipment have an asset number?' as 'Yes'.

A default value can be assigned to a piece of information, meaning that this value will automatically be populated as the request is created. It is possible to allow a user to overwrite a default value if required by not making the information read only or hidden.

As the request moves through the creation and authorization process it is possible to force a user to populate a piece of information by making it mandatory to that particular 'role'. For example, post the end user raising a request for a software install it may be a requirement that the Software Management Team provide an install key, in this instance 'Install Key' would be made mandatory for the Software Management Team. It is also possible to hide information from or make information read only for particular 'roles'.

Request List Box Information

The description is the text presented to the user when they select a List Box in the request process. The List Box entries are displayed in the order provided; however these can be re-sequenced.

8.2.6 Advanced Form Layout

The advanced form layout functionality allows the request to be arranged into 'Sections' which can be in a single on two column format and then enter fields within each section. Sections can have a 'Title' and 'Description' bar which can be color coded using a standard set of colors provided. Each Section can have any number of fields shown in each column.

Templates are provided for both one and two column sections which can then be copied and pasted into the 'Adv Form Layout' worksheets at header, item and supplier level; enabling the Advanced Form to be laid out in the spreadsheet.

8.2.7 Authorization

Authorization can be used to electronically manage different types of request approval. It can also be call external systems, whilst automatically updating users by email on their request at defined stages. Authorization can run sequentially or in parallel, to individuals or groups of users. The authorization routing can be based on the request requested by the end user, in combination with a Division and/or Cost Centre or via information captured on the request i.e. a list box value.

Each step within the authorization workflow is assigned a 'role', for example: Cost Centre Approver; Software Licensing; Network Permissions Administration. Each role can be defined as: a 'Notification' role – receives an email informing them that the request has been raised no action required; a 'Staging' role – the user is required to review the request and add further information, or; a 'Approval' role – the user is required to either approve or decline the request, they also have the ability to add further information where indicated.

8.2.8 Fulfillment

Internal fulfillment allows for a process to be defined that will be executed after the request has completed approval. This process can involve user interaction or integration with other systems. A process consists of a number of activities that will be executed dependent on the structure of the process.

It is recommended that fulfillment processes are documented via tools such as Microsoft Visio and then the Fulfillment Task Details worksheet is used to capture the details of each task. Templates are provided within the spreadsheet for each of the activity tasks and these can be copied into the Fulfillment Task Details worksheet as required.

The following activities are available within an internal workflow:

Sequence

A sequence activity executes all of its children in order one after the other. It waits for each activity to complete before starting the next one. The activity does not complete until the last child activity has completed.

Parallel

A parallel activity starts to execute all of its children at the same time. The activity does not complete until all of its children have completed.

Decision or Branch

A decision activity provides the ability to decide which of its possible two children is run dependent on a set of conditions. If the request matches the conditions specified then any child in the "Then" branch of the activity will be executed, otherwise any child in the "Else" branch of the activity will be executed. If multiple conditions are added to the activity, you decide whether you want the result to be dependent on any or all of the conditions passing.

Delay

A delay activity waits for the time specified and then completes.

Inbox

An inbox activity provides the ability to create an Inbox Task that requires user action. An inbox activity requires a specified User or User Group (or the Requested By or For user) to carry out the task, along with a Role. The role determines what Request fields are visible and whether the user can (or indeed must) edit the request. Also specified is the allowed duration of the task, entered in days, hours or minutes and calculated using the system level configured 'Business Time'.

When the activity runs the required user or group is emailed the Action as well as the Instructions, who must then complete the task using the Inbox Task list. The action and instructions fields support template properties and XSLTs that will be replaced at run time. An inbox activity completes when the inbox task that is created is completed or cancelled.

Email

An email activity provides the ability to email one or more recipients information about a request. The subject and message fields support template properties and XSLTs that will be replaced at run time. An email activity completes as soon as the email has been queued for sending.

Web Service

A web service activity provides the ability to call a web service on a remote system to enable system integration. The web service call is a Request Fulfillment message. If "Wait for response" is not checked a web service activity completes as soon as the web service call has been made successfully. If "Wait for response" is checked a web service activity will wait until the Front Office (Directa) API has received a CompleteRequestFulfilmentActivity message for this activity.

8.2.9 SLA

A Service Level Agreement (SLA) allows measurement of key time based metrics in the lifetime of a request. An SLA has a duration entered in days, hours or minutes, calculated using the system level configured 'Business Time', and can optionally notify a single user, a user group or an email address if the SLA fails to complete within this specified duration. The subject and message fields support template properties and XSLTs that will be replaced at run time.

All SLAs associated with the Request Type will be created along with the Request. Initially they will all be pending. An SLA can be opened and closed either via the Internal Fulfillment process or via calls to the Front Office (Directa) API i.e. via approval hook functionality during the approval process. All measurements are relative to the date and time the SLA is opened. If the SLA has not been closed after the specified duration it will automatically move to 'Failed', however if it closes before the duration specified it will move to 'Passed'.

Additional notifications can also be created for an SLA. These notifications have a duration period of days, hours or minutes, calculated using the system level configured 'Business Time, and will fire while the SLA is open either before or after SLA failure. These notifications can either inform a single user, user group or email address of impending (or past) failure and can also optionally set the SLA to a 'Warn' status to show it is likely to fail soon.

Templates are provided within the spreadsheet for both SLAs and associated notifications and these can be copied into the Fulfillment SLA Details worksheet as required.